

## Is Your Agency Ready to Serve Transgender and Non-Binary Clients?

	Yes	No	N/A <sup>1</sup>	DK <sup>2</sup>
<b>TANGIBLE</b>				
<b>Forms &amp; paperwork</b>				
<b>Intake forms</b>				
○ Include name of use (in addition to any request for 'legal' name)				
○ Include pronoun(s)				
○ Include gender/sex options beyond female/male (or do not ask for gender/sex at all)				
○ Include partnership status and relationship options (include same-gender-loving relationships, legally recognized and not forms of partnerships)				
○ Include gender-neutral honorifics (e.g. Mx. In addition to Mr., Ms.)				
○ Emergency contact asks for relationship to client				
○ Medical information includes N/A options (for those who do not want to disclose)				
○ Medical history form organized by organ system or function rather than sex				
<b>Office records</b>				
○ System for recording name of use and pronoun(s)				
○ System emphasizes name and pronoun client uses (so staff will be aware of what name to use)				
○ Staff access to transgender information is limited (to protect client privacy)				
○ Name and gender health insurance is under is recorded and used to facilitate accurate billing				

<sup>1</sup> Not applicable is to be used if the type of services delivered render the measure not applicable. An example would be a rape crisis hotline that is not visited by clients and so has no waiting room.

<sup>2</sup> Don't know

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<b>Client/patient bill of rights</b>				
○ Given to every client				
○ Prominently posted				
○ Available on website				
○ Explicitly includes gender identity/expression non-discrimination pledge				
○ Addresses privacy and confidentiality				
○ Outlines complaint procedure				
○ Addresses law enforcement involvement				
<b>Non-discrimination policies</b>				
○ Explicitly include gender identity and gender expression				
○ Explicitly include sexual orientation				
<b>Consent forms/contracts</b>				
○ Explicitly Includes gender identity/expression non-discrimination pledge				
○ Outlines complaint procedure				
○ Addresses privacy and confidentiality				
○ Addresses law enforcement involvement				
○ Addresses partner/parent access to records, staff, information				
<b>Complaint / grievance policies</b>				
○ Clients have an anonymous way to express concerns, grievances and complaints				
○ Non-retaliation is guaranteed to those who file a grievance				
○ Staff will work to address all complaints reported				
○ When client is known, staff will work to appropriately address complaint with client and involve them in the solution (as much as client desires)				
○ Staff have a forum for making complaints / grievances against other staff members (including noting when staff are not being respectful of trans/non-binary clients)				

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<b>Anti-bias policy</b>				
○ Explicitly includes gender identity and gender expression				
○ Explicitly includes sexual orientation				
○ Addresses client-client bias				
○ Addresses staff-staff bias				
○ Addresses client-staff bias				
○ Refers to complaint/grievance policy				
○ Given to all clients				
○ Given to all staff (or in agency handbook/policy/procedure manual(s))				
○ Staff receive training on policy and a chances to role-play				
<b>Medication policy (generally for residential programs only)</b>				
○ Policy specifically addresses controlled substances or Schedule I, II, III medications (including Testosterone)				
○ Clients maintain access (direct or through staff) to medications, including to hormones they are already prescribed / taking				
○ Clients can access trans-informed physicians who can prescribe medications, including hormones if a client was already on hormones, or wishes to pursue				
○ Sharps (needle) protocols exist for clients who are self-injecting (hormones or other medications)				
▪ Sharps containers are easily accessible to clients using injectable medications and in locations that allow for medical/personal privacy				
○ Policy addresses clients who are on hormones not prescribed from a physician (e.g. May these continue? Or will client be supported in getting connected to trans-affirming medical provider?)				

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<b>Witnessed or observed urinalysis policy (if required)</b>				
○ If a witness is required, client is allowed to determine the gender of the observer				
○ System allows clients using testosterone to be charted so that they are not marked positive for steroid use				
○ Urinalysis policies are discussed with all clients so trans clients do not feel singled out or vulnerable				
<b>Placement policy for sex-segregated or sex-specific services</b>				
○ Policy is written				
○ Is it clear to clients and staff who can be admitted to or included in your programming, shelter, services				
○ Policy explicitly addresses how placement of trans and non-binary clients will be determined				
○ Policy explicitly addresses room, roommate placement				
○ Policy aligns with federal, state, local and funder non-discrimination requirements (e.g., VAWA, HUD, FVPSA, HHS, Title VII, Title IX)				
○ Client allowed maximum self-determination				
○ Placement decisions explicitly protected from other clients' complaints (i.e., trans person won't be removed or re-assigned due to another client's gender-based complaint)				
○ Equal access to services is guaranteed (this can refer to adherence to funder/federal guidance or internal policies that note that all clients entering a program/service will have equal access to services as other clients allowed entrance)				
○ All staff are trained on this policy and any funder or government non-discrimination policies related to gender identity/expression and sexual orientation.				
○ If children are accepted and/or placed based on gender, policy includes specific language				

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addressing trans, non-binary, gender non-conforming children.				
<ul style="list-style-type: none"> <li>If there are gender-based age differences around acceptance and/or placement, policy includes specific language addressing trans, non-binary, and gender non-conforming children.</li> </ul>				
<b>Access to gender-affirming prosthetics and items</b>				
<ul style="list-style-type: none"> <li>Available supplies include gender-affirming prosthetics and items, including.... ?</li> </ul>				
<ul style="list-style-type: none"> <li>Larger sized women's clothing (including underwear and sleepwear) and shoes</li> </ul>				
<ul style="list-style-type: none"> <li>Smaller sized men's clothing (including underwear and sleepwear) and shoes</li> </ul>				
<ul style="list-style-type: none"> <li>Gender-neutral clothing in a wide range of sizes</li> </ul>				
<ul style="list-style-type: none"> <li>Make up, including foundation</li> </ul>				
<ul style="list-style-type: none"> <li>Razors</li> </ul>				
<ul style="list-style-type: none"> <li>Wigs</li> </ul>				
<ul style="list-style-type: none"> <li>Gaffing or tucking devices</li> </ul>				
<ul style="list-style-type: none"> <li>Breastforms and/or hip pads</li> </ul>				
<ul style="list-style-type: none"> <li>Binders</li> </ul>				
<ul style="list-style-type: none"> <li>Packers/Packies</li> </ul>				
<ul style="list-style-type: none"> <li>Menstrual products available to all residents (i.e. not just in women's restrooms)</li> </ul>				
<b>Surveys</b>				
<ul style="list-style-type: none"> <li>Outreach to trans and lesbian, gay, bisexual populations</li> </ul>				
<ul style="list-style-type: none"> <li>Allows for gender identities beyond female/male</li> </ul>				
<ul style="list-style-type: none"> <li>Includes same-sex partnership questions</li> </ul>				
<ul style="list-style-type: none"> <li>Does not presume gender of victims or perpetrators</li> </ul>				

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<b>Staff email and other identification</b>				
○ All staff include pronouns in their email signature file				
○ Staff with nametags have an option to include pronouns				
○ Posted/available staffing list includes names and pronouns				
<b>Trans employee inclusion</b>				
○ Transgender and non-binary employees can smoothly transition on the job				
▪ A written policy exists, delineating rights, practices and protocols for an employee transitioning on the job				
○ Transgender and non-binary employees can access bathrooms and locker rooms in line with their gender identity and/or gender expression				
○ Information provided for background checks is kept confidential [Note: some trans /non-binary people will list prior names. This information will not impact hiring.]				
○ Human Resources maintains confidential employee records, which may include information about a staff person's sex assigned at birth, former name, etc.				
○ Employer-offered health insurance does not exclude trans-related physical or mental health care				
○ If sex-segregated services are provided, there is clear policy guaranteeing trans women, trans men, and non-binary or gender non-conforming staff have the same access to facilitation roles as non-trans women and men				
<b>Bathroom options</b>				
○ All gender option is available				
○ All single-user bathrooms are for any gender user				

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○ Signage lets bathroom users know that people can use the gendered bathroom that best aligns with their gender (and others should not police bathroom choice)				
○ Non-harassment policies explicitly include bathrooms				
○ Available products are unscented or in “gender-neutral scents”				
○ Colors and art subjects are not skewed toward one gender				
○ Menstrual products are available in all bathrooms				
<b>Service models and curriculum</b>				
○ Acknowledges survivors of all genders				
○ Includes examples of survivors who have offenders of all genders				
○ Includes trans-specific content (or awareness that trans people will be clients)				
<b>Advertising/Publicity</b>				
<b>Website</b>				
○ Images include men (straight, gay, bi, trans), Trans people, Lesbian, Gay, Bisexual people				
○ Language and pronouns reflect all genders				
○ Explicit (gender identity/expression) non-discrimination statement included				
○ Overt welcome of Trans and LGB clients included				
○ Service exclusions, if any, are explicitly stated				
○ Admission/services determination criteria explicitly stated (including about gender inclusion/exclusion)				
○ Staff bios and pictures are available, ideally including staff pronouns				
<b>Print ads</b>				
○ Images include men (straight, gay, bi, trans), Trans people, Lesbian, Gay, Bisexual people				

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○ Admission/services determination criteria explicitly stated (including about gender inclusion/exclusion)				
<b>Letters/flyers/brochures</b>				
○ Images include men (straight, gay, bi, trans), Trans people, Lesbian, Gay, Bisexual people				
○ Language and pronouns reflect all genders				
○ Explicit (gender identity/expression) non-discrimination statement included				
○ Overt welcome of Trans and LGB clients included				
○ Service exclusions, if any, are explicitly stated				
○ Admission/services determination criteria explicitly stated (including about gender inclusion/exclusion)				
<b>Social media/newsletters</b>				
○ Images include men (straight, gay, bi, trans), Trans people, Lesbian, Gay, Bisexual people				
○ Language and pronouns reflect all genders				
○ Explicit (gender identity/expression) non-discrimination statement included				
○ Overt welcome of Trans and LGB clients included				
○ Service exclusions, if any, are explicitly stated				
○ Admission/services determine criteria explicitly stated (including about gender inclusion/exclusion)				
○ Newsletter always has Trans/LGB content (even if very small!)				
○ Regular Trans/LGB posts on blogs and social media				



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<b>Displayed materials</b>				
<b>Brochures</b>				
○ Images include men (straight, gay, bi, trans), Trans people, Lesbian, Gay, Bisexual people				
○ Text refers to Trans and LGB individuals				
○ Text uses varied pronouns				
○ Trans and LGB-specific brochures are prominently displayed				
○ Includes trans pride or rainbow pride flag (or Safe Zone, if appropriate)				
<b>Posters/art</b>				
○ Human images are diverse				
○ Color/subjects are not skewed toward one gender				
<b>Magazines</b>				
○ Topics appeal to clients of various genders, races, interests				
○ Trans and/or LGB-specific magazines and materials are displayed				
<b>Informational/FAQ sheets</b>				
○ Recognize perpetrators and victims are of all genders				
○ Acknowledge same-sex relationships and gender diversity				
<b>Stickers/flags/signage</b>				
○ "Bias-free zone" or similar notice prominent				
○ Trans/LGB-specific and/or rainbow signs displayed				
<b>Bulletin boards</b>				
○ Trans/LGB business cards displayed				
○ Trans/LGB event flyers posted				
○ Clients encouraged to post materials				

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<b>Bookshelves/library</b>				
○ Trans/LGB books displayed				
○ Books on other types of diversity displayed				
<b>Referrals</b>				
• Trans/LGB-savvy referral list available				
• All staff have access to Trans/LGB referrals				
• All referrals screened for Trans/LGB awareness/knowledge				
• Staff does <i>not</i> assume clients must locate their own Trans/LGB-savvy referrals				
• Referrals given based on client need – clients are asked if they would like a provider who is trans knowledgeable				
• If screening providers for a client, the client's gender history or identity is only disclosed with explicit consent				
<b>Visible feedback/complaint mechanisms</b>				
• Explicit feedback/complaint procedures				
• Complaints can be filed anonymously				
• Procedures are “advertised” throughout agency and its materials				
• Procedures are included in clients’ rights and consent forms				
• Staff promote feedback/complaint procedures				
<b>Tracking Trans/LGB clients</b>				
• Gender identity and sexual orientation is asked on forms or interviews				
• Gender identity and sexual orientation data is tracked				
• Tracked data is used to enhance outreach, prevention, and service provision to Trans/LGB clients				

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<b>Training</b>				
<b>Transgender cultural competency</b>				
○ All staff & volunteers have orientation transgender cultural competency training				
○ All staff and volunteers have ongoing transgender cultural competency training				
<b>Addressing bias</b>				
○ All staff and volunteers have orientation training on addressing bias in staff and other clients				
○ All staff and volunteers have ongoing training on addressing bias in staff and other clients				
○ Staff members are coached on addressing biased remarks				
○ Clients are advised agency is a “no bias” zone				

	Yes	No	N/A <sup>3</sup>	DK <sup>4</sup>
<b>INTANGIBLE</b>				
<b>Existing reputation</b>				
<ul style="list-style-type: none"> <li>Positive experiences serving trans/non-binary clients</li> </ul>				
<ul style="list-style-type: none"> <li>When no experience serving trans/non-binary clients: <ul style="list-style-type: none"> <li>Check re: who was turned away</li> </ul> </li> </ul>				
<ul style="list-style-type: none"> <li>When negative experience serving trans/non-binary clients: <ul style="list-style-type: none"> <li>Record what you learned</li> <li>Record how problem(s) were rectified</li> <li>Develop written procedures to prevent problem(s) from reoccurring</li> </ul> </li> </ul>				
<b>Agency name “female”</b>				
<ul style="list-style-type: none"> <li>Consider changing agency name to one that includes all genders</li> <li>Record how service philosophy has changed</li> <li>Record how new policy is advertised</li> </ul>				
<b>Be present at transgender events</b>				
<ul style="list-style-type: none"> <li>Attend, participate, table at or are involved at transgender events</li> <li>Volunteer to help support transgender events</li> <li>Promote trans-focused events to clients and staff</li> </ul>				
<b>Develop joint projects with transgender organizations</b>				
<ul style="list-style-type: none"> <li>Work with transgender individuals/organizations on projects</li> <li>Outreach to transgender organizations to see where partnerships could occur</li> <li>Offer to cross train with transgender organizations</li> </ul>				

<sup>3</sup> Not applicable is to be used if the type of services delivered render the measure not applicable. An example would be a rape crisis hotline that is not visited by clients and so has no waiting room.

<sup>4</sup> Don't know

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<b>Community partnerships &amp; events</b>				
• Staff booths/tables at Trans/LGB events				
• Transgender organizations table at your events				
• Agency sponsors transgender events/fundraisers				
• Transgender organizations are on agency's mailing list				
• Advertise in Trans/LGB periodicals/community papers				
• Staff paid to do transgender networking, attend conferences				
• Staff serve on Trans/LGB boards and/or advisory committees				
• Staff subscribe to Trans/LGB listservs/social media sites				
• Agency leaders have held meetings with transgender leaders				
○ Ask about referral lists				
<b>Active monitoring of attitudes/tone</b>				
• Transgender issues are regularly discussed at staff meetings				
• Challenging/biased situations are reviewed by supervisors				
• Employees are evaluated on how welcoming they are				
• Staff have support structures				
• Client feedback is sought and used				
<b>Client/staff interactions and language</b>				
• Body language is open and accepting				
• Staff avoid invasive curiosity questions				
• Clients are told why questions are being asked				
• Questions are open-ended				
• Questions are non-gendered				
• Staff reflect client's language				

	Yes	No	N/A <sup>3</sup>	DK <sup>4</sup>
<b>Out T/LGB staff</b>				
• Staff are comfortable being out as Trans and/or LGB				
• Staff converses about Trans and/or LGB topics at work				
• Staff vacancies are advertised in Trans/LGB venues				
• Staff are active participants in transgender organizations and events				
• Transgender individuals are on agency Board of Directors/Advisory Board				
• Transgender individuals are volunteers at the agency				
• Transgender individuals help make policy				
• Transgender consultants are hired				
• Transgender staff receive promotions				

**Comments:**

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for **REACHING VICTIMS**

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